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## Notice of Intent to Certify Sole Source

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**To:** Interested Parties  
**From:** Craig P. Orgeron, CPM Ph.D.  
**CC:** ITS Project Number 48720  
**Date:** February 25, 2025  
**Re:** Sole Source Certification Number 4669 to provide TRIM software maintenance and technical support for the Mississippi Department of Information Technology Services (ITS)  
**Contact Name:** Naz Khan  
**Contact Phone Number:** 601-432-8014  
**Contact E-mail Address:** Naz.Khan@its.ms.gov

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### **Sole Source Certification Award Details**

Regarding Information Technology Services (ITS) Sole Source Certification Number 4669 for the Mississippi Department of Information Technology Services (ITS), please be advised that ITS intends to award Treehouse Software, Inc., as the sole source provider of TRIM software maintenance and technical support through March 17, 2026, in an amount not to exceed \$8,100.00. If ITS opts to renew the TRIM software maintenance, this sole source certification shall be valid through March 16, 2028. Please be advised that ITS will determine if additional licenses, enhancements, upgrades, or support, are within scope during the certification period and may increase the spending authority accordingly. Should Treehouse Software, Inc. change their name during this certification period, then ITS will determine if a recertification is necessary. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment B: Sole Source Procurement Overview.

### Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

**TRIM was implemented to monitor and report on ADABAS and Natural performance for the State Payroll and Human Resource System (SPAHRs) application running on the ITS legacy mainframe, as well as translate ADABAS security log files through a largely menu-driven interface. Any re-engineering of production systems would be costly to both ITS and Data Center customers. Since the majority of performance issues are raised with respect to a live production system rather than a system under development, a performance monitor that is able to function efficiently in a production environment is an essential component of effective performance monitoring. TRIM has been an integral part of the ADABAS environment for multiple**

**decades, and the proprietary technical support and software maintenance for it are needed while SPAHRS remains active.**

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

**The TRIM software is integrated into the State Data Center’s production process to facilitate usage data collection, performance monitoring, and security reporting for Natural applications using the ADABAS database. In addition to providing real-time performance metrics, TRIM also includes the ability to track down and address performance issues. Ease-of-use and the proprietary technical support for TRIM have placed the software as an industry standard in performance monitoring.**

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

**Treehouse Software, Inc. is the sole source company that owns the TRIM product and is the only company that can provide product licenses, annual maintenance, and technical support for TRIM software. The Vendor’s sole source certification letter is included as Attachment A.**

### Schedule

| Task                             | Date                               |
|----------------------------------|------------------------------------|
| First Advertisement Date         | 02/25/25                           |
| Second Advertisement Date        | 03/04/25                           |
| Response Deadline From Objectors | 03/11/25 at 3:00 P.M. Central Time |
| Notice of Award/No Award Posted  | Not before 03/12/25                |

### Project Details

The Treehouse TRIM software was acquired by ITS in the late 1980s through a competitive RFP procurement. After the Treehouse TRIM product was acquired, it was implemented to monitor ADABAS and Natural. In February 2015, ITS began certified the Treehouse TRIM software and maintenance as sole source and has not received any objections. The total spend to date is \$195,979.74

### Submission Instructions and Format of Response from Objecting Parties

Interested parties who have reason to believe that the TRIM software maintenance and technical support should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract to Treehouse Software, Inc.

- 1.1 Interested Party Information

- 1.1.1 Contact Name, Phone Number and email address

- 1.1.2 Company Website URL, if applicable

- 1.2 Objection to Sole Source Certification

- 1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.

1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.

1.3 Comments will be accepted at any time prior to Tuesday, March 11, 2025, at 3:00 p.m. (Central Time) to Naz Khan at [Naz.Khan@its.ms.gov](mailto:Naz.Khan@its.ms.gov) or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Naz Khan to verify the receipt of their Responses. Responses received after the deadline will be rejected.

1.4 Interested Party responses should include the following information:

|                                                                                                                                                                                                             |
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| <p style="text-align: center;"><b>SUBMITTED IN RESPONSE TO</b><br/><b>Sole Source Certification No. 4669-48720</b><br/><b>Accepted until March 11, 2025 @ 3:00 p.m.,</b><br/><b>ATTENTION: Naz Khan</b></p> |
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If you have any questions concerning the information above or if we can be of further assistance, please contact Naz Khan at 601-432-8014 or via email at [Naz.Khan@its.ms.gov](mailto:Naz.Khan@its.ms.gov).

Attachment A: Vendor Correspondence  
Attachment B: Sole Source Procurement Overview



2605 Nicholson Road, Suite 1230  
Sewickley, PA 15143

December 12, 2024

Erica Cornelius, CPM  
Mainframe and Database Manager  
MS Department of Information Technology Services  
3771 Eastwood Drive  
Jackson, MS 39211

Erica:

Treehouse Software, Inc. is the sole source company that owns the product TRIM and is the only company that can provide product licenses, annual maintenance, and technical support for TRIM software.

TRIM is not available through a reseller.

Please contact [finance@treehouse.com](mailto:finance@treehouse.com) if you have any questions.

*Amber Ray*  
Amber Ray  
Finance Consultant  
(724)759-7070

## Attachment B

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website ([www.its.ms.gov](http://www.its.ms.gov)).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment A.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$75,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.